

Stewardship of Land

An Investigation into the State of the Art



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“Stewardship calls upon everyone in society to assume responsibility for protecting the integrity of natural resources and their underlying ecosystems and, in so doing, safeguarding the interests of future generations.”

President’s Council on Sustainable Development,
Sustainable America: A New Consensus, 1996

“Stewardship: the individual’s responsibility to manage his life and property with proper regard to the rights of others.”

Webster’s Collegiate Dictionary

Table of Contents

	Page
I. Executive Summary	3
II. Background	5
III. Stewardship Concepts	5
IV. Survey Process	7
V. Survey Responses and General Findings	7
A. Stewardship through Conservation Easements	7
B. Stewardship through Active Land Management	12
C. Community Stewardship	15
VI. Key Issues and Concerns	17
VII. Opportunities to Meet New Challenges	19
VIII. Conclusions	24
Appendix A: Participating Organizations	26
Appendix B: Participants at April, 1999 Roundtable	26

I. Executive Summary

Over the course of the past 20 years, the land conservation movement in the United States has succeeded in protecting hundreds of thousands of acres of lands with significant biological, productive, aesthetic and open space values. While the pace of land protection is accelerating, questions have emerged regarding both the lands already under protection and those which might be priorities for protection in the future. How should this land be managed? What are the important conservation values to be protected and how can these be determined, measured, maintained and enhanced? How can we find the funds and partners needed to realize our goals? As we enter the new millennium, stewardship of land is increasingly viewed as the prime objective of land conservation action and the major issue facing the land conservation community.

In 1998, The INNW Fund, a charitable foundation in California, asked Conservation Partners, Inc., a conservation planning and consulting firm in Denver, to conduct an investigation into land stewardship. This was to include a survey, a set of follow-up interviews and a subsequent roundtable discussion among land trusts, land management groups and a host of others engaged in land protection activities. The goal of this process was to determine the current definitions of land stewardship techniques, the key issues related to stewardship practices facing land conservation groups and land managers today and potential options to meet these challenges. The following report on the results of this process is intended as a modest first step toward understanding some of the challenges in managing special open and natural lands that are critical to the life and identity of our communities. It is our hope that these results provide some direction and momentum in how to constructively address the ongoing challenges of land protection and stewardship.

Stewardship embodies three concepts: responsibility, care of the land, and management of the land for the benefit of future generations. As a term of art in the land conservation field, stewardship has been interpreted and used in a variety of different ways. In order to characterize different approaches towards stewardship, the report defines three levels of stewardship practice:

- *Conservation Easements.* The first level of stewardship refers to the monitoring and enforcement of conservation easements, the legal instruments widely used to voluntarily limit development on private properties that possess significant conservation values.
- *Active Land Management.* The second level of stewardship refers to actual land management practices: the identification of values in need of protection on target lands and ongoing, active and adaptive management of resources to achieve the protection of those values.
- *Community Stewardship.* The third level refers to stewardship as a community value – the development of goals, programs and partnerships to protect a regional or community-scale landscape or set of resources.

A thread of responsibility for the land and its benefits to future generations runs through the activities in this continuum. As you advance along the continuum, responsibility moves from third party enforcement to active land management to collective community involvement. As the scale of activity moves from individual parcels and landowners to larger landscapes and communities, the degree of complexity and challenge increases.

The term “stewardship” has evolved to cover this broad set of activities. While all of these activities are legitimate components of stewardship, our study revealed that a more comprehensive or encompassing definition of stewardship and its common threads will help ordinary citizens understand and invest in the value and significance of stewardship activities. Our participants explored various ways of defining the term, and many believe that the best

way to describe stewardship is as a continuing *process* with a defined set of steps ranging from understanding a landscape to determining and implementing the best means to protect and adaptively manage it. Many believe that integrating land protection and management activities in an overall stewardship framework or process will not only improve land protection, but also could engage more people in caring for land as well as make stewardship more attractive for funding.

The study demonstrates that while conservation easements are an increasingly popular and effective technique for voluntary land protection, there are very serious threats which imperil their long term potential. Fortunately, specific opportunities exist to mitigate these threats through collective action. For example, participants endorsed the establishment of minimum standards in a manner which adds rigor and consistency to the conservation product without destroying the vitality and diversity of the conservation movement. Others see the potential of establishing pooled defense funds or an insurance program as ways to mitigate the costs and risks of challenges to conservation easements.

On a more fundamental level, many respondents felt the need to capture peoples' positive concern for proper care of land or emotional attachment to land in defining a third dimension or leg to the current monitoring and enforcement tasks in conservation easement stewardship. This third component relates to the potential for creating a more active partnership between the land trust and the landowner for appropriate care of land. Such an approach addresses the concerns of one respondent who stated that emphasis should shift to include not only "protection *from*, but protection *for*."

Defining what we are protecting for in terms of goals, objectives and measures of success for land conservation, however, is more difficult and requires greater clarity of vision. The study identifies ways that respondents feel that success can be described and how tools such as monitoring, management plans, best management practices and indicators of ecological health can be used to assess progress. A major theme is the need to connect science and the practice of land management with land protection action to address a set of common stewardship goals. Nature is dynamic and there is an evolving body of knowledge and science being successfully applied to the management of special lands. In order to improve the stewardship product and explore the integration of science and land saving, a set of collaborations between effective land saving organizations and stewardship entities and managers is proposed to test and refine an integrated approach.

Practitioners are seeking information and education as well as interconnection between the often disparate groups involved in stewardship activities. Our participants proposed the formation of a communications network to connect and educate players and encourage partnership activities. There is a need to communicate accurate and relevant stewardship ideas, information and practices in a more collaborative and effective way. This will allow for the productive exchange of a wealth of information and experience on land management options that is housed in a diverse set of individuals and organizations.

The study emphasized that the cultivation and training of conservation and stewardship leaders is critical to improving stewardship at all levels. Raising the funds necessary to support stewardship and skills enhancement will be challenging. However, by defining stewardship more broadly and positively as the activities of the continuum, the range of stewardship activities and partnerships should become more attractive to funders. These and other important stewardship issues are explored in this report. We hope you will read the report in its entirety and invite your comments on the issues and ideas presented.

II. Background

As a term of art in the land conservation field, stewardship has been interpreted and used in many different ways. Stewardship embodies three concepts: responsibility, care for the land, and management of land for the benefit of future generations. It is employed to describe monitoring and enforcing conservation easements, managing land to encourage and sustain ecological health, managing lands to maintain the diversity of earth's plants and animals, and engaging a community in more actively protecting the natural resources on which its livelihood depends. Some would argue that the term is overused and that we need a different term or terms. Confusion over what is meant by stewardship may have diminished the power of the ideas that it conveys. No other word, however, is as compelling in capturing the concepts of responsibility, care for the land, and management of land for future generations in the way that "stewardship" does.

Two centuries ago, the English term "stewardship" implied the responsibility of the landed gentry to protect a family's land and resources from one generation to another to ensure the continued prosperity and honor of their lineage. The concept included a sense of responsibility by the landowner to the broader community, in part because healthy, prosperous tenants in a squire's village worked the land more productively. Today, we have a broader concept of responsibility for ecological health on a global scale, as well as a greater urgency about the dangers of *not* providing good stewardship of lands in our communities.

Special natural, scenic and open space resources are under greater pressure than ever before, and conservation organizations are protecting these lands from development at an accelerating pace. How will the special conservation values of these lands be maintained and managed to promote ecological health and to engage citizens and communities in this effort? What is good land stewardship, at the beginning of the twenty-first century?

III. Stewardship Concepts

To begin this effort, we developed a structure to define the universe of stewardship activities. We believe that stewardship can be understood in terms of a continuum based on who accepts responsibility for stewardship and the activities they pursue. This continuum spans three general areas: conservation easement stewardship, active land management and community stewardship.

The most basic form of stewardship is that performed by land trusts across the country, operating at local, state, regional and national levels. Increasingly, these organizations are using conservation easements to protect special lands from development in a voluntary, cost-effective and non-governmental fashion. Given the pressures of protecting land from development, land trusts have historically focused on protecting land first through legal protections, leaving land management concerns to landowners. As holders of conservation easements (permanent deed restrictions limiting future development) land trusts have a stewardship responsibility to monitor the lands on which they hold easements and ensure that there are no violations. The land trusts are the stewards of the *conservation easement*, while the landowner continues to be the owner and steward of the *land*. In this fashion, land trusts are third party guardians of the terms of the easement rather than actual land managers or landowners. A major challenge faced by land trusts is to maintain sufficient resources to monitor and enforce easements permanently.

Conservation easements often restrict management practices that harm conservation values, but are less successful in promoting positive management practices. While many land trusts provide education or assistance to landowners for land management, their primary focus is on saving land from development through the purchase or donation of conservation easements.

“Stewardship” activities in this case ensure that the voluntarily agreed-upon restrictions set out in the easement are not violated.

The second level in the stewardship continuum is active land management to meet long-term ecological health objectives. This term “active land management” is used here to describe an intentional approach to managing land to protect and enhance its conservation values (i.e. wildlife, open space, biological diversity, recreation, etc.). A hands-on landowner or land manager carries out this type of stewardship. The word “active” distinguishes it from a more “passive” approach, whereby protected land is “left alone”, unmanaged and often unhealthy in a broader landscape context. The Nature Conservancy, certain local and state nonprofits, local, state and federal agencies and private landowners practice varying levels of active land management designed to enhance the natural functions or health of the lands for which they are responsible.

Active land management is practiced according to a set of land management objectives. These objectives are developed to achieve goals related to the values being protected on one or more properties. Land management objectives promote actions that may protect or enhance the natural functions of the land, balance human and natural activities and encourage native plants and animals. Active land management focuses on the use of specific land management practices, monitoring results over time and flexibly adjusting strategies to meet long-term health and resource goals. Best Management Practices (BMP's) may be developed to guide management activities and to balance human and natural objectives to achieve resource goals. Achieving stewardship through active land management requires time and financial resources, specific land management and scientific expertise and a long-term commitment. This form of stewardship requires a more direct, active, focused and hands-on level of responsibility for what happens on the land.

The third level in the stewardship continuum is community stewardship, which engages the diverse elements of a community in a concerted effort to manage lands and natural resources in a fashion which sustains both the natural resources and the human economy of the area. Community stewardship takes the lessons of active land management practiced on individual properties and applies these on a community wide or landscape basis for the long-term benefit of the land, people and economy. Community stewardship focuses on large land complexes or regions and a process to tie the local and regional community to effective and long-term management of its natural resources. Aspects of community stewardship are being pursued in numerous places around the country. Examples can be found in the work of the Willapa Alliance and Ecotrust in Willapa Bay, Washington, and numerous Nature Conservancy projects, including the Virginia Coastal Reserve and Yampa River area of Colorado, as well as in collaborative projects like the ACE Basin in South Carolina.

A thread of responsibility for the land and its benefits to future generations runs through the activities in this continuum. However, as you advance along the continuum, responsibility moves from third party enforcement to active land management to collective community involvement. The scale of activity moves from individual parcels and landowners to larger landscapes and communities. The degree of complexity and challenge increases and the skills required change from more legal and transactional to land management, natural sciences and community leadership, education and facilitation. In reality, while most land trusts are currently focused on conservation easement stewardship, they are becoming more involved in active and community stewardship. In fact, the activities of the lower level of the continuum enable actions at the higher levels. For example, protecting land through conservation easements often opens the door to changing management practices to encourage conservation values, which in turn can lead to more collective action to protect and manage lands on a neighborhood or community level.

IV. Survey Process

Conservation Partners conducted an informal stewardship survey of approximately 25 respondents from eighteen organizations across the country. (The list is attached as Appendix A). The survey involved both a written survey and follow-up interviews, conducted during October and November 1998. Participants included land trust professionals from state-wide and local land trusts, management consultants and organizations, and national conservation groups. Participating organizations ranged from well-established statewide groups, such as the Vermont Land Trust, to local and regional groups, such as the Brandywine Conservancy in Pennsylvania, to actual land management organizations, such as the Center for Natural Lands Management in California.

During the interviews, discussions focused on all three types of stewardship, but over half the questions focused on stewardship through conservation easements. Participants were also asked to discuss (1) how they defined stewardship; (2) what their organizations were doing in terms of active management; and (3) the most pressing areas of need included under the stewardship umbrella. The responses indicate that stewardship issues are being addressed in many ways by many organizations and that participants welcome the possibility of greater information exchange on topics related to stewardship. In order to review the draft survey findings and evaluate recommendations, a meeting was held in Half Moon Bay, California on April 22 - 23, 1999, at which fourteen land conservation representatives, scientists and land managers met. The results of this meeting are reflected in the report's discussion of issues and opportunities.

The discussion of survey results is organized in the next three sections. Section V summarizes the responses of participants to the survey, according to the three stewardship categories. Section VI summarizes key stewardship issues and concerns, and Section VII identifies a set of opportunities to meet these challenges.

V. Survey Responses and General Findings

A. Stewardship through Conservation Easements

Most of the survey respondents work for organizations that accept conservation easements or facilitate easement transactions. These easements are donated to protect a variety of public and conservation values (including wildlife habitat, scenery, open space, biological diversity, agricultural and forest lands) rather than focusing on a sole attribute or quality. The organizations represented run the gamut from those that accept a few easements annually to those that currently manage 600 to 700 easements. Most groups monitor their easements on an annual basis, typically on the ground, but some through both aerial and ground monitoring. Most use staff and interns for monitoring, and a few use volunteers.

Importance and Effectiveness of Conservation Easements

All respondents felt that conservation easements are important tools for conserving land. Most felt that conservation easements are "very important"; a few felt that it was the "most important" land protection tool. One respondent noted that while conservation easements are very important, they are still relatively untested. There was a diversity of opinion about the effectiveness of easements. Half the respondents indicated that they are "very effective", half indicated that they are either "somewhat" or "moderately" effective. Again, some felt that not enough time has passed to determine whether they will hold up legally in perpetuity, as intended. The responses also indicated that from a land protection perspective, easements are strong, but from the perspective of requiring land *management* to protect conservation values, there is a greater question as to their effectiveness. There is clearly a need for the

land trust and landowner to understand the nature and value of the natural resources in question before conservation easements can be effective at protecting them over time. One respondent indicated that there are many variables in this issue, including how clearly conservation values are identified, the quality of the easement drafting and landowner motivation. Several respondents noted that owning and managing land is still the most effective way to ensure that conservation values are protected, although cost is obviously a major constraint in both acquiring and managing land.

Flexibility to Accommodate Change

Most respondents indicated that conservation easements are flexible enough to accommodate future changes in traditional land use activities such as agriculture and forestry, even if these uses become uneconomic. Most indicated that this is a tricky issue with which they continually struggle. Flexibility is a double-edged sword because excessive compromise can defeat the purpose of the easement restrictions. A number of respondents indicated that they attempt to augment strong easements through reference to specific management plans, which are updated periodically. This approach ensures that basic requirements and restrictions of the easement are maintained, while allowing for flexible and changeable management approaches to sustain conservation values. Respondents indicated that while some landowners are open to management plans, others are not, leaving the land trust to determine how important a management plan is to the success of the easement. Management plans may be created by government agencies such as the National Resource Conservation Service (NRCS) or by independent consulting biologists or specialized resource consultants.

Effectiveness of Monitoring and Enforcement

While most respondents that manage conservation easements felt that their organization provides effective easement monitoring and enforcement, they were uncertain of the capabilities of other land trusts. A majority of respondents indicated that they were either unsure, or felt that most land trusts are not providing adequate stewardship of their easements. There was concern that smaller land trusts with limited financial resources may not be performing an adequate job and that it would only take a few bad apples to discredit the good work of most organizations. Several respondents indicated their concern with erratic easement stewardship by government agencies that accept easements. One respondent indicated that land trusts focus a great deal of energy on the easement transaction, but “need to realize that 99% of their job is remaining once the deal is done.”

According to several respondents, stewardship through easements works best when it is a specific task integrated into the monitoring organization’s annual work plan. One respondent indicated that this type of stewardship is a good task for interns and volunteers if proper supervision is available. Several respondents indicated the need for specific standards of performance and adequate funds to ensure a higher level of performance and the need to train land trusts in performing stewardship responsibilities.

Violations: How Great are the Risks?

The respondents believe that the risk that easements will be violated is significant. Many respondents differentiated between major and minor violations. Those organizations that handle many easement transactions indicate that minor violations are not uncommon. The risk of major violations, which occur very infrequently, increases significantly over time. One respondent indicated that this increase is exponential. While some believe that the risks are greatest in the next five years, most place the greatest risk in the next six to twenty years. Many indicated that as land ownership changes, the risks rise, particularly starting with the second and third land ownership change after the initial donation. Given the rate at which land changes hands, these risks are increasing. One respondent indicated that in his state, 20% of the land changes hands every five years.

Several respondents also mentioned that the rate at which the surrounding land use and landscape are changing potentially influences future violations. If properties surrounding a protected land are converting to other uses, not only do economic pressures increase to modify the easement, but the viability of traditional activities, such as agriculture and forestry, becomes more tenuous. There is concern that smaller land trusts will have difficulty in addressing violations, especially those that have not created sufficient stewardship endowment funds to support legal defenses when challenges arise.

Reducing the Risk of Violations and Improving Effectiveness

Respondents provided a number of suggestions to reduce the risk of violations and make conservation easements more effective. Several stressed both pre-closing and on-going landowner education and contact. More frequent contact with landowners can lead to not only greater mutual understanding, but also to greater organizational support from the landowner community. About half of the respondents expressed concern that inadequately structured easements will invite challenge. Proposed remedies included better training for land trusts' staff, attorneys and specialists, providing greater oversight over land trust easement activities and monitoring easement violations as they arise. One respondent stated that unendowed easements represent significant liabilities to land trusts, but are not often viewed as such.

Several respondents indicated that since there are real threats to conservation easements, land trusts need to bring greater rigor to structuring easements, and should ensure that their organizations have the financial capacity to handle potential challenges. One respondent mentioned the possibility of a pooled defense fund or insurance program which land trusts could buy into since there are hundreds of land trusts and literally thousands of easements in place today. Other suggestions for minimizing the potential for violations include developing and enforcing more effective management plans and practices as part of the easement process, increasing funding for stewardship activities and more frequent contact with landowners. Better education of public agencies as to the responsibilities of easement holders will reduce the potential for violations of conservation easements held by public entities.

Setting Standards

There are now over 1,200 land trusts of all sizes and capabilities that increasingly utilize conservation easements to protect special lands. The complexity of these transactions, the fact that they are permanent restrictions and that they require sound natural resource science, raises the issue of whether to establish minimum standards or a certification program to ensure competency. All of the respondents stated that it is time for at least some form of minimum standards. Most respondents believe that the Land Trust Alliance (LTA) has made a good start in defining stewardship responsibilities in its "Standards and Practices" Guidebook and that it is the logical choice for instituting a minimum standards program. However, there is concern that participation "be voluntary, peer reviewed, non-bureaucratic, un-big-brother like" as one respondent stated.

While minimum standards may be appropriate, many respondents expressed concern over a certification program. They worried about whether smaller land trusts would be able to qualify for such a program. Most respondents, however, indicated that whether it's minimum standards or certification, there is a need for a mechanism that ensures a level of quality control. There was agreement that the conservation community will benefit enormously by an appropriate, but yet to be defined level of self-regulation.

Protecting Conservation Values

A number of suggestions were provided to improve the way that conservation easements encourage management of properties to protect conservation values. Increasingly, land trusts are attaching management plans to easements with requirements for periodic updates. The development of the management plan serves to engage and educate the landowner to the special resources on the property and the management responsibilities necessary to protect those resources. Practitioners regard this process as a constructive way to work cooperatively with a landowner, but note that some landowners do not want to be instructed on how to manage their land. There is also concern about the legal implications of tying easements to management plans. Several respondents indicated that with some landowners, the more rigorous the process of identifying management issues at the beginning, the greater the potential that specific provisions can be included in the easement.

A number of respondents identified the following general process to ensure protection of conservation values:

1. Prepare sound ecological baseline inventory and reference in easement.
2. Identify management goals and objectives with landowner. Provide educational resources if needed.
3. Include goals in the easement document and develop management plan responding to goals and objectives.
4. Reference management plan in easement, update and monitor ecological conditions periodically.

This process raises several issues. Not all landowners and land trusts have the financial resources or the inclination to perform these tasks and not all projects may require this level of detail. Also, not all land trusts or landowners have the financial capacity to engage scientific expertise to help in the assessment of ecological conditions and recommendations.

Several respondents identified two additional ways to improve land management through easements. The first is to upgrade old easements that may have been completed without baseline reports or reference to management plans, or whose language should be improved. In some cases, landowners can be persuaded that they can protect important values on their properties by either tightening language or clarifying vague terms or conditions on an existing easement. In other instances, there may be the opportunity to enhance the conservation result by removing reserved homesites, thereby providing additional tax benefits.

The second approach to improving land management through easements is to provide affirmative assistance to landowners for various management actions. This might be as simple as holding seminars on issues such as noxious weed management or as involved as cost sharing for riparian fencing, wetland protection or the preparation of management plans. Such actions demonstrate that both the land trust and landowner have affirmative responsibilities in a stewardship partnership and encourage the continuation of a constructive relationship after the easement is signed. Several respondents maintained that land trusts have affirmative obligations as well as the negative, legalistic obligation of monitoring and enforcing conservation restrictions.

Best Management Practices

All respondents felt that minimum standards or “Best Management Practices” (BMP's) for managing conservation properties should be defined in the easement or an accompanying management plan. It is clear, however, that this is a major issue with which many organizations are struggling. (One respondent indicated that their organization has long “obsessed over this issue”). Several respondents indicated that minimum standards or BMP's should be *encouraged*, not required. Most indicated that the best place to identify BMP's is in a management plan.

Attitudes towards BMP's fall into two camps. Most land trust practitioners are skeptical of BMP's, distrustful of their utility and often unfamiliar with the science behind them. The science-based land managers and consultants are much more certain of the utility of BMP's once management objectives have been established. They have been using science to evaluate and refine management practices for years and to develop specialized expertise in range management, conservation biology, wildlife biology, hydrology, use of fire, weed management and restoration. From these responses, it is clear that the land savers need to be linked more effectively to the land managers and scientists. As one participant stated, we must “link science with the land trust community”.

Several respondents indicated that BMP's are dynamic and will change over time. This reinforces the benefits of incorporating BMP's in an attached management plan, that is updated periodically and that responds to goals and objectives established in the easement. One respondent indicated that there is a “missing science piece” between land management practitioners and land trust staff. Collaborative efforts to produce a land management plan offer the potential to better incorporate science into the stewardship product. Another respondent summed up his attitude by saying, “land trusts should take the attitude of being facilitators of better land management, rather than private policemen.” The conservation easement transaction is a unique point in the ownership of land where a variety of land management options can be constructively evaluated with the landowner. Several respondents believe that through better connections to science-based land managers and understanding of the science, land trusts can harness the “missing science piece” and better prepare the landowner for responsible management.

Land Trust and Landowner Education

Land trust educational opportunities identified include the need for more comprehensive and efficient technical information dissemination among land trusts, the need for access to scientists and land managers to aid in setting management objectives and/or BMP's for properties and opportunities afforded by improved communication between land trusts.

Many land trusts offer landowners a variety of opportunities to learn about proper land management. These efforts occur through workshops, special events, articles in newsletters and special information pieces for landowners. Some land trusts hold workshops or conferences to educate landowners. Most respondents felt that these efforts were successful in disseminating information, but were less certain of the practical impact on land management. A few land trusts have programs that recognize landowners for adopting successful stewardship practices. Other programs offered by associations of farmers, ranchers and forest operators recognize successful practices, but do not use the same criteria that would be used for a land stewardship award.

Stewardship Endowments

Most land trusts establish stewardship endowments to cover their monitoring and legal enforcement activities. There are almost as many ways used to calculate stewardship

endowments, as there are land trusts. The key variables in determining the amount of stewardship contribution are: amount of staff time for monitoring, transportation costs, likelihood of violations, size of property, number of reserved homesites and types of management responsibilities to be monitored. Some land trusts will accept easements without stewardship endowments if the landowner cannot financially meet the requirements.

For most land trusts, the size of the endowment is negotiable. Many land trusts are reluctant to ask for larger endowments because the landowner is giving up substantial property rights and may be paying significant transaction costs. However, in most cases, the landowner is receiving a sizable income tax benefit. Typically, most endowment requests are relatively small in relation to the overall tax benefit. In addition, respondents stated that landowners should understand the significant liabilities that are being undertaken by the land trust in terms of permanent protection of the property. Several respondents stated that stewardship activities (monitoring and enforcement) are so often portrayed as negatives and liabilities that they have a hard time focusing on the positive benefits of stewardship. These respondents felt that land trusts were often put in the position of having to defensively justify stewardship costs with landowners. In fact, responsible land stewardship should be a central goal of all land conservation and the conservation easement tool.

While there is great variability in what is generally requested for an endowment, the average is in the range of \$3,000 to \$7,000 per property. Several respondents felt that stewardship endowment funds are not sufficient for both annual monitoring and potential litigation costs, particularly for smaller land trusts. This is a particularly difficult calculation, because although the likelihood of legal challenge is small, the costs associated with legal defense are very high. The lack of sufficient endowments means that monitoring activities may be under-funded, limiting effective landowner interaction, education and communication. Several respondents indicated that there should be more defensible ways to calculate stewardship endowments which take into account long-term costs, value of the gift, monitoring, landowner education and a better assessment of potential liabilities. One tool developed by the Center for Natural Lands Management in California is the PAR (Property Assessment Record) a software program that helps to identify management tasks and costs for long-term monitoring and management. One respondent stated that it is essential to make stewardship more financially attractive and suggested that it be defined as an inherent capital investment in the long-term health of the property. The idea of pooling stewardship resources in state or regional stewardship funds was mentioned by several respondents to increase overall stewardship capacity.

B. Stewardship through Active Land Management

Active land management provides for the long-term management and health of lands and natural resources by focusing on specific land management practices. Active land management is practiced by many local, state and federal governmental agencies, private landowners, private land management companies and some nonprofit organizations. The Nature Conservancy, with its system of preserves throughout the country, practices land management on its lands in systematic ways to maintain and enhance biodiversity. Other organizations practice active land management to achieve goals such as sustainable forestry and agriculture, balancing natural and human objectives and minimizing erosion or restoring a natural hydrologic regime. In a general sense, the key ingredients to active management are:

- Understanding, from a scientific as well as human perspective, land and resources and connections to the larger landscape.
- Establishing goals and objectives for the land and developing measures of success.
- Defining strategies, including science-based actions, to meet goals and abate threats.
- Developing the capacity to implement through funding and personnel.
- Monitoring progress towards goals and adjusting actions according to results.

Most of the respondents were more familiar with land conservation transactions than actual land management, although several were either directly involved in land management or are consulting conservation biologists. Most of the respondents could identify people or organizations with specific land management expertise that they could recommend to landowners wanting direction on how to manage their properties. A majority recommended state and federal agency personnel such as NRCS, USFS, state departments of natural resources or departments of wildlife, and state and county extension agents. While stressing the need to be selective, several respondents indicated that there are resource people in these agencies that can provide practical and knowledgeable assistance in land management. Beyond the agency personnel there is a myriad of consulting foresters, conservation biologists, ecologists, biologists, landscape architects and consulting experts that can provide assistance to landowners and land trusts. Some land trusts have resident expertise in areas of land management or keep lists of external consultants with whom they have worked.

Use of BMP's in Active Land Management

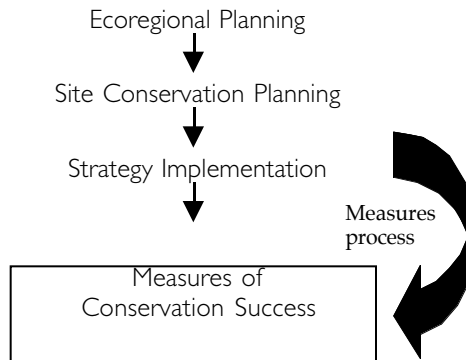
There was a mixed response to a question about whether BMP's have been defined for specific ecosystems, regions or landforms. Many land trusts refer to government agency standards and practices, such as conservation plans prepared by NRCS. One respondent noted that their organization has defined BMP's for certain kinds of lands, but feels they lack thorough scientific understanding and are more anecdotal than well researched.

Most of the information about BMP's is outside the network of land trust communication and is more likely to be found in scientific journals, resource agency publications and with consultants. Among scientists and consultants, there is a greater certainty that given a set of resource objectives, management strategies and direction can be logically defined. One respondent cautioned that although he was aware of BMPs, he hoped they would not become so standardized that people would not recognize the need to adapt BMPs to the specific circumstances of a particular landholding. The dynamic nature of land indicates that BMP's should be used with understanding of their strengths and limitations. Several respondents stated that among land trusts today there is a tremendous thirst for knowledge about BMP's, what management practices work on the land and what's cutting edge. Several respondents indicated that those land trusts that have both strong stewardship programs and active land management projects are inundated with requests for information that they are struggling to accommodate. From these comments, it is clear that there is both a need and opportunity to connect the land trust community to those knowledgeable in the science and practice of land management.

Defining Success

When asked how "success" is defined in terms of "active" or "sustainable" land management, or whether their organization had a set of defined principles, again responses were mixed. Many indicated that they had not defined standards or indicators of success. When pressed to define success, several respondents indicated that they rely on government or agency standards, which may or may not be appropriate. TNC has focused a great deal of attention on defining success in land management in terms of ecological health and criteria, and has developed the following draft charts to define elements of success.

The Conservation Process



The Five-S Process

- Systems (conservation targets & processes)
- Stresses (destruction & degradation of processes)
- Sources (agents causing stress to systems)
- Strategies (treat abatement and restoration)
- Success Measures (ecosystem health and threat abatement)

Measures of Success

- Are we making progress towards our goals?
- Are we being effective at abating the threats?
- Are the targets "healthy"?
- Do we have the capacity to implement effective strategies?

Criteria for Measures of Success

- Measure results towards conservation goals
- Encourage right action
- Functional
- Clear and compelling

Measures of Conservation Success

- Ecosystem Health: estimated viability of selected conservation targets
- Threat Status and Abatement: success in abating critical threats to the conservation targets
- Capacity: leadership, strategic approach, funding

Many respondents indicated that they struggle with a definition of success in terms of land management. The respondents from science backgrounds stressed the need to define objectives -- "What are we managing for?"-- and that criteria or measures of success can be defined once the objectives are clear. Again, respondents felt that stronger connection of land conservationists with land managers and scientists will create a better understanding and articulation of success.

Costs of Active Land Management

All but three respondents reported that their organizations had not developed cost guidelines for specific management activities. One of the exceptions is the Center for Natural Lands

Management in California (CNLM), which has created a system to both define management systems to meet management objectives and to determine costs of these actions. They have developed a system called Property Analysis Record (PAR), which is a cost-effective process to develop a short-hand management plan with associated costs and a calculation of the long-term support required to manage conservation lands in perpetuity. Since it was created in 1990, the Center has completed analyses on more than 95 mitigation and conservation properties and is currently managing more than 49,000 acres of conservation lands throughout California. The other exceptions are either land trusts that have advanced into this area or consultants that prepare such analyses as part of their services. Most of the respondents indicated that there are a variety of governmental and nonprofit partners available to fund or cost share certain management activities. In general, public entities such as the state and county extension services, NRCS, USFWS, USDA and state Departments of Natural Resources are logical candidates to partner on specific management projects.

C. Community Stewardship

Community stewardship takes the lessons of active land management practiced on individual properties and applies them on a community wide or landscape basis for the long-term benefit of the land, people and economy. Community stewardship focuses on larger land complexes or regions and a process to tie the local and regional community to effective and long-term management of its natural resources. As identified by respondents, aspects of community stewardship are being explored in numerous places and projects around the country. The movement toward regional land use and conservation planning speaks to an increased understanding that ecological boundaries rarely coincide with political ones.

Defining an Appropriate Scale

The respondents indicated that, in general, it is more meaningful to consider a larger complex or region in order to address both natural resource and community issues. Most respondents felt that a regional watershed scale was the most appropriate to explore both issues. However, depending on the resource or issue, individual communities, counties or political regions might be more appropriate. The key seems to be a defining an area that shares a common identity, natural resources or ecological systems and history or set of associations.

Ingredients of Community Stewardship

All of the respondents felt that local leadership in community-based conservation and community stewardship projects was either the most important ingredient or a very important ingredient to their success. In order to build the capacity of local organizations for stewardship activities most respondents felt that cultivating local leadership was either the most important or second most important factor. About half the respondents were aware of state or local leadership development programs that could assist with these community efforts. Other critical factors included providing people with better information, particularly on the relationship of conservation to people's lives, providing more financial resources and partners and focusing on regional identity. Partnering with public agencies and interest groups that haven't traditionally focused on conservation is also important to community-based program success.

Generally, the availability of local financial resources was viewed as critical to the success of community-based conservation approaches, which are often employed in rural regions with declining resource-dependent economies. One respondent noted that while there may be sufficient resources to do planning, often there are insufficient resources to implement projects. As a result, community interest may decline due to a lack of on-the-ground success.

Indicators of Sustainability

Most respondents are not familiar with “indicators of sustainability” or “healthy community indicators”. These are measures that have been developed to assess the natural, social and economic health of communities and regions. One respondent indicated that he had drafted a set of indicators and another stated that he would like to see a set of indicators of stewardship developed.

Volunteers

All of the respondents are aware of, or have worked with, community or volunteer groups that monitor lands, educate landowners or perform management activities on conservation lands. For instance, the Brandywine Conservancy uses a group of 10-12 interested residents to monitor properties. Such groups can be very helpful and cost-effective if given proper orientation and coordination. A beneficial by-product is that they can become informed ambassadors of the conservation program through their exposure to volunteer tasks. In Iowa, the Iowa Natural Heritage Foundation works with communities, county conservation boards and youth-at-risk programs to develop restoration and monitoring programs. The Society for the Protection of New Hampshire Forests has developed a means to increase volunteers’ effectiveness by sponsoring an informative training program that charges participants a modest fee. With participation in projects, the fee is paid back to the volunteers as an incentive to complete the program.

National Stewardship Entity

Respondents were asked about the potential usefulness of a national land management entity that could manage lands held by private, public or nonprofit groups to maintain and enhance conservation values. The response was mixed. About half the respondents felt this was a good idea, some opposed it and some respondents felt that they would need to understand how such an organization would operate before endorsing it. Several respondents indicated that such an effort would more likely work at regional levels than at a national level, due to the regional variance in landscapes and management issues. Funding was thought to be the largest impediment to the creation of national or regional entities. However, there are at least two currently operating models for such an entity, The Nature Conservancy (TNC - a national non-profit) and the Center for Natural Lands Management (CNLM – a regional group). The Nature Conservancy owns and manages millions of acres nation-wide for ecological health. As mentioned previously, the CNLM also holds and manages lands with special ecological values. CNLM is finding that its services are in great demand and that funding permanent stewardship activities is feasible. The success of the Center demonstrates that the provision of scientifically-based, competent management services to private, public and nonprofit landowners is in high demand.

Stewardship Network

Respondents were asked whether there is a need for a national stewardship network that would operate as a clearinghouse to provide resources to those engaged in land and community stewardship efforts. Responses were mixed. While there were a number of positive responses, the predominant sentiment was “maybe”, if certain conditions could be met. The conflicting sentiments relate as much to the “what” and “how”, as to the validity of the idea. Some respondents saw the clearinghouse as an opportunity to deal with the full range of stewardship issues and to integrate the various techniques into defining stewardship as the product of land conservation.

A number of respondents stated that the Land Trust Alliance and TNC would be the logical leads in establishing such an entity. There were questions concerning whether TNC, which is a storehouse for much stewardship information, would be open to this approach, especially since it is in the midst of a major internal reorganization. In general, it was felt that some of the institutional hurdles could be overcome if a new communications system could help

redefine and significantly improve management of special lands in this country. It was suggested that this concept be presented to both LTA and TNC for their consideration as well as to potential funders. Several respondents indicated that the most advanced communications technology should be employed and sufficient financial resources located to perform this service in a quality and relevant fashion. As one respondent stated, we should do it “right” or not do it at all.

VI. Key Issues & Concerns

While the activities of the three levels of the stewardship continuum are often discrete, requiring different expertise, levels of responsibility and types of activities, there has been a gradual blurring of the lines between them. As the survey indicates, many organizations are advancing along the spectrum toward seeking greater community responsibility and involvement. As more land is protected from development, increasingly the question asked is, “What is the conservation product and how can its quality be ensured?” Among the majority of land trusts there is still an understandable preoccupation with saving land first to forestall development threats and worrying about how it is managed later.

Different actors have taken the lead in the three stewardship areas; land trusts in conservation easements, land managers and scientists in active land management and community or regional interest groups in community stewardship. The desire expressed by respondents for greater interaction between the three levels is an indication of the blurring that is occurring. As the pace of land conservation quickens, there is increased interaction and partnering among the groups. However, up to this point, this has been more coincidental than part of a larger stewardship strategy.

The following issues are the most frequently identified challenges or threats that were identified in the survey, the April, 1999 meeting in Half Moon Bay and follow-up conversations with the respondents.

A. Threats to Conservation Easements

As the survey indicates, conservation easements are increasingly the tool of choice for protecting land among the nation’s 1,200 land trusts. The survey demonstrated that on the stewardship side of conservation easements - monitoring and enforcement activities - there are serious threats to the use of easements. These threats include: inadequate monitoring efforts, increasing minor violations and likelihood of major violations, the turnover of easement-protected lands to new owners that may be less sympathetic to land protection, inadequately funded stewardship programs, poorly structured easements that should be updated and the inadequacy and lack of consistency in landowner education efforts. While these are serious threats, most respondents indicated that they are not immediate, and are more likely to result in problems in a six to twenty year timeframe. This indicates a near-term window of opportunity to minimize these threats through collective action that does not threaten the vitality of the land trust movement, but adds rigor and consistency to its conservation product.

B. Ambiguous Definition of Stewardship

While “stewardship” is a powerful term, conveying the three concepts of responsibility, care for the land, and management of land for the benefit of future generations, it has seldom been refined into a set of specific activities, objectives or process. Because the term is used to cover numerous activities, it is in danger of losing its relevance. The three levels in the stewardship continuum each have their own semantic issues. While “stewardship” of conservation easements is generally used to describe monitoring and enforcement activities, responses indicated that there is an affirmative, land caring interaction with the landowner dimension that has not been defined. This “third” dimension of easement stewardship may

be the most important in the future and may help to improve the effectiveness of monitoring and enforcement.

With active land management, there are many different ways to manage land. However, consultants, scientists and conservation biologists agree that, given land objectives, “stewardship” in the form of management strategies can be defined in a relatively straightforward manner. What is often missing in active land management-as-stewardship is science and the wealth of experience of practitioners. Nature is dynamic, the scientific research is continually being updated, and there is an evolving body of knowledge being successfully applied to the management of special properties.

For Community Stewardship, there is an incredible range of projects and activities that have been described under the headings of either stewardship or community-based conservation. This diversity is healthy, but it makes it difficult to define. Ways to more accurately describe creative community stewardship efforts would be useful.

C. Need to Connect Science to Land Protection

A theme which came up repeatedly in our survey is the need to help land conservation practitioners use scientific analysis better in decision-making (i.e. to set conservation priorities, determine resource conservation criteria and goals and develop strategies to effectively achieve them). This need applies throughout the spectrum of stewardship activities. For land trusts working with landowners through conservation easements, the need for both improving internal capabilities to assess and manage land and expanding external connections to scientific and consulting resources is great. Within the active land management community of land managers, agencies, nonprofits, and consultants there is the need to communicate conservation goals and outcomes more effectively and work with others that have direct access to landowners.

The majority of organizations that participated in the survey stated that they had not defined measures of success for their activities, nor were they aware of best management practices (BMP's) that have been defined for riparian, wetland, prairie, and forest ecosystems. Stephen Apfelbaum, a respondent who is an ecologist with Applied Ecological Inc., a management consulting firm based in Wisconsin, stated that BMP's for various ecosystems have been defined and published by the scientific community. However, as he and other participants remarked, the technical experts are not always in communication with or even known to land trusts. Finally, a major tenet of many community stewardship efforts has been to develop new ways of managing resources in a collaborative process that relies on scientific understanding and monitoring of a variety of resource management strategies. These approaches are testing conventional wisdom and defining significant new approaches to the management of land through scientific application which engages diverse elements of a community or region.

D. Better Definition of Success

Defining success underlies stewardship at all levels. Unless success is defined, it is difficult to determine the effectiveness of various approaches and organizations. In terms of stewardship, defining success requires greater clarity of vision for a “conservation product” and refinement of goals and objectives. Many successful land trusts, having protected so much land from development, are asking: What is the goal for these lands? In many cases the answer revolves around stewardship. Is success measured in number of acres under easement? Number of acres managed by a certain agency? Measuring the health of a certain parcel of land or a distinct landscape unit? Is success measured by improved management practices or who is involved in a particular community? For a particular group or area, one or all of these issues may be important to defining success. What has been lacking, however, is a more critical definition of the elements of success so that progress can be monitored and

adjustments made. Such a definition can bring the various players in the stewardship game into more effective communication and partnership towards identified ends.

E. Lack of Effective Communication among Stewardship Actors

There are many actors in the universe of stewardship activities. These include land trusts, scientists from various disciplines, consultants, land management companies, community groups, government agencies, and private landowners, to name only the principal players. Often, however, groups practicing different forms of stewardship do not communicate effectively with each other, so that there is little cross-fertilization and much duplication of effort. All respondents mentioned the need to communicate stewardship ideas and practices in a more collaborative and effective way to take advantage of the wealth of information and experience that is housed in individuals and organizations. At a time when there is a tremendous demand for information on land management options in the land trust community there needs to be more effective ways for accurate and relevant information to be shared in an efficient manner.

F. Skills and Leadership Challenge

The discussions on this topic emphasized that land trusts need additional skills, training, resources, and better information (based on science) to manage the land and easements effectively and adequately. Many of the community stewardship projects and efforts are in the early stages of their evolution. The most frequently identified issue for the success of these efforts was finding and training local leaders. The challenges of collaborative stewardship efforts are enormous, entailing skills in facilitation, community development, and natural resources management. Assisting and cultivating leaders for the challenges they face is a large and complex task. Leadership development opportunities are needed for conservation practitioners, many of whom work in remote locations and require training for the evolutionary challenges their organizations will face.

G. Funding Stewardship

At all levels of stewardship there are enormous funding challenges. In the case of stewardship through conservation easements, issues range from calculating and funding stewardship endowments, to managing enforcement liabilities, to funding landowner education efforts. Active land management requires an understanding of the true costs of management and often significant resources for enhancement or restoration of degraded resources. Community stewardship may have the greatest funding challenges since many of these efforts are in remote, resource-rich but economically depressed areas. Unless outside assistance is available, often there are insufficient resources for maintaining the collaborative process and planning, let alone implementing specific initiatives. These issues are all pieces of the stewardship challenge. Coordinating fundraising efforts under a broader umbrella effort, which incorporates all three levels of stewardship, has the potential to attract greater resources to funding stewardship activities.

VII. Opportunities to Meet Challenges

The survey responses identified a myriad of possible ways to meet the stewardship challenges facing the land conservation movement. A follow-up meeting involving a number of the respondents and invited participants held in Half Moon Bay, California in the spring of 1999 provided an opportunity to review the survey results and refine and focus some of the opportunities identified. The following section identifies a number of these opportunities, as a means to stimulate and focus discussion and identify potential actions.

A. Stewardship Network

Many believe that stewardship is the central defining issue and concept in land conservation today. Stewardship of land is the end product or goal of land conservation. Given the lack of available information and interconnection between disparate groups involved in stewardship activities, there is the need for a communications system to connect and educate the players and to encourage partnership activities. Such a network would allow, among other things, information sharing, description of case studies, resource referrals, and identification of potential partners or funders.

While there is excitement about the pace of activity at the three levels of stewardship, there is also frustration about lack of access to relevant information, resources and case studies. The desire for information on BMP's, appropriate land management practices, resource experts, monitoring techniques and other stewardship issues can be addressed through an electronic network or clearinghouse. The many small and often remote groups that are working on aspects of community stewardship, for instance, are often unaware of the experiences of others, except through the efforts of regional publications such as *High Country News* and *Chronicle of Community*.

This type of network could take the form of an interactive web page or other electronic communication network to link these groups, interests and resources. A website would have the advantage of being a centralized resource, easily available to remote participants. It could serve as a posting site for "needs checklists" and cost analysis measures related to land transactions and stewardship planning. It could provide access to skills and expertise on a range of topics. It could be further used to organize or facilitate forums for discussion among stewardship interests throughout the country. Participants in the survey responded very favorably to this idea, and commented that a primary challenge would be engaging and utilizing professionals with relevant skills and experience in the site's development and maintenance as a resource. Beyond the Internet, information and resource sharing networks could be formed between land trusts at the regional level.

There are at least two potential key players in creating these types of networks, LTA and TNC. LTA is the established link to over 1,000 land trusts and TNC is arguably the best national repository for natural land science and management expertise. Both organizations could contribute to and benefit from the establishment of such a network. An electronic network would have to be well researched and funded, but the funding piece would probably be attractive to a variety of foundations and information-based businesses if a feasible business plan were developed. The key to establishing a successful web page is the creation of a system to develop up-to-date, relevant and reliable information and connections. As a result, governance of the effort and maintenance of quality control are key issues in the establishment of such a network. The feasibility of this concept should be evaluated and the potential involvement of LTA, TNC and others determined.

B. Address Specific Stewardship Issues

There are currently a host of specific and unresolved stewardship issues that should be explored systematically. Key issues should be identified, alternative strategies considered, consensus developed and findings reported. One option would be to establish interdisciplinary groups of practitioners to meet, discuss and recommend ways to handle these issues. The results of these meetings would be summarized in issue papers which would be circulated for peer review and comment. Many of these issues relate to conservation easements, so that the meetings might best be hosted by LTA. LTA would need to have sufficient funding, organizational capacity and commitment to this process for this type of initiative to proceed. Partnerships could assist LTA in developing such a program and the effort could be

initiated on a trial basis. LTA has recently launched its Learning Circle initiative, which has a similar approach. Stewardship issues might be included in this initiative if additional funding can be located. Specific issues most often discussed as needing such attention include:

- Range of costs associated with land management activities
- Procedures for establishing stewardship endowment levels
- Financing stewardship and land management
- Definition of indicators of ecological health or sustainability
- Stewardship monitoring procedures.
- Mapping resources important for stewardship and monitoring.
- Role of management plans in conservation easements, what should be included?
- Use of BMP's.
- Systematic way to evaluate site factors: initial screening questions to detailed inventory and identification of values for protection.
- Managing public access.
- Training and use of volunteers in stewardship.
- Upgrading older easements.
- Landowner education programs.

C. Clarify the Range of Concepts and Activities Included under the Term Stewardship

The term “stewardship” as it applies to land conservation should be clarified and defined in clear and precise language so that ordinary citizens can understand and invest in the value and significance of a variety of stewardship activities. A more comprehensive description of what is meant by the three elements of stewardship should be explored as well as the common threads which tie them together. The terms developed should apply to the full stewardship continuum from easements to community stewardship.

As suggested by a number of respondents, one approach to defining stewardship is to view it not so much as a set of activities but as a continuing *process*. The “stewardship process” is a way of going from the general to the specific, of first understanding a landscape or resource and then determining the best means, across the continuum, to protect and manage it. The process is a way to integrate land protection and management activities in an overall stewardship framework. In this fashion, stewardship is an integral component of every land protection transaction. The Nature Conservancy has developed a description of its approach, which can serve as a model or starting point to define a process which is relevant to all conservation and stewardship work. The stewardship process might include the following steps:

Understand the regional context. What is the region and how is it defined? What are its key characteristics? How do natural and cultural boundaries and definitions coincide?

1. Understand key natural resources. What are the major stresses and causes of change to the natural and open space systems?
2. Define stewardship goals/objectives and key resources and lands important to maintaining natural systems.
3. Develop indicators of ecological health or measures of success (i.e. State natural heritage programs, TNC process, acreage of key lands protected, etc.)
4. Evaluate land protection and management options, strategies, funding, community support, and partnership potentials.
5. Implement land protection and management strategy (i.e. the Stewardship Strategy).

6. Develop land management plans to meet objectives and define meaningful monitoring standards.
7. Modify land protection and management based on feed back from monitoring (i.e. adaptive management).

As was discussed by many respondents, the term stewardship as it currently applies to conservation easements has been too narrowly defined as referring only to monitoring and enforcement. There is general agreement that it should include a third component related to the potential for positive partnerships for land management between the land trust and landowner. This captures the idea, as one respondent put it, of not only “protection *from*,” but protection *for*.” While it is difficult to identify this in one catchy phrase, perhaps it is “land management”, “land health”, “land care” or “land partnership”. This piece covers a set of land trust activities aimed at informing the landowner and improving land management approaches and practices cooperatively. The types of activities that might be covered include landowner education, landowner recognition, courses on land management, work on BMP's and other activities aimed at assisting the landowner improve their ability to manage the land. If this approach is adopted, a portion of the stewardship endowment should be allocated to these affirmative activities. This concept should increase overall resources dedicated to stewardship and provide stronger motivation for creating the capital investment necessary to ensure both the long-term protection and ecological health of the property.

D. Stewardship Partnerships

In order to explore the true potential of combining “the missing science piece” with land saving action, as well as to refine the “stewardship process”, a number of experimental collaborations should be pursued. The objective of these collaborations would be to combine effective land saving organizations with proven land managers, stewardship entities and scientists to conduct joint projects and programs. Integration of science and land saving as projects are initiated should produce a more potent stewardship product, engage a larger and more diverse segment of the community and incorporate stewardship objectives into transactions at an earlier stage. These projects and programs should test and refine the “stewardship process” with the objective of documenting successes and failures which can be reported to the broader conservation community.

It is important that these efforts not only involve specific projects, but larger landscapes and entire organizational programs that may involve a number of entities working together towards a set of common stewardship goals. The potential for “corporate level” partnerships (partnerships between land trusts and land management entities) should be explored if the true potential for these collaborations is to be understood. Respondents discussed a number of potential regional collaborations, most notably in California which might involve local and regional land trusts, land stewardship entities and scientists. In order for these partnerships to gel, there is need for financial assistance to facilitate and encourage the process. Unless there is financial glue to pursue these initiatives, most of these organizations are too occupied with their current full agendas to devote energy to speculative ventures. As a result, foundation funding for these initiatives should be sought. Respondents believe that this funding is available and that the issue is more the level of desire of the potential partners to commit themselves to a process with unknown, but potentially great outcomes.

E. Leadership and Skills Development

A majority of participants believe that a continued emphasis on the cultivation and training of conservation and stewardship leaders is critical to improving stewardship at all levels. Respondents mentioned three areas of need. First, more professional training regarding stewardship activities; second, programs to train volunteers, in order to increase their usefulness to the land trust community; and third, training for ecological assessments, in order to connect land trust to land management practitioners and scientists. Leadership and skills

training are receiving a great deal of emphasis from LTA and the Conservation Fund through their joint sponsoring of the Conservation Leadership Institute. These efforts are very important and should be expanded in the stewardship area. There was also the suggestion of creating a Stewardship Education Institute, an institute available to professionals whose course list would be dedicated specifically to management issues and activities. The Institute might be connected to Yale School of Forestry and Environmental Studies, Michigan School of Natural Resources and the Environment, or other prominent natural resources programs.

It was further suggested that a standards and practices guidebook be developed, relating specifically to stewardship. This guidebook would be similar to and coordinate with LTA's operating manual for land trusts which is entitled, The Standards and Practices Guidebook. It would contain a description of the stewardship process, monitoring practices, best management techniques, partnership entities, land management approaches and options and landowner education approaches.

Finally, respondents proposed finding the funding to employ land management experts to consult with groups of land trusts or to establish land management teams to provide assistance to land trusts in specific topical areas. These "Partners in Management" might help more experienced land trusts with expert assistance in specific areas so that they can become models of good practice. Larger land trusts may then in turn help small, volunteer land trusts needing a greater amount of assistance with stewardship.

F. Stewardship Prize

The idea of a stewardship prize has been proposed as a way to highlight the positive accomplishments that landowners achieve in land stewardship. This honor would be given annually to a landowner that, through their management activities, has maintained or enhanced the natural functions of the property in an exemplary, replicable and cost effective fashion. The prize might be similar to the Cato Conservation Award but could be co-sponsored by a host of organizations and associations including: national land conservation organizations, forestry associations, national agricultural associations and other groups that support the concept of sustainable or compatible land management. Such an award would serve to bring recognition and credibility to stewardship activities and encourage others in pursuit of similar objectives. The development of this type of prize would require partnership with funders and sponsoring organizations.

G. Establishment of Minimum Standards for Conservation Easements

All of the respondents stated that it is time for at least some form of minimum standards and self-regulation by the land trust community. Conservation easements are complex and permanent real estate transactions that require skilled expertise in order to be rigid enough to protect targeted resources yet must remain flexible enough to account for future changes. The threats to conservation easements are real and immediate and there is clear need for establishment of minimum standards to mitigate those threats.

The Land Trust Alliance is the logical choice for instituting a minimum standards program and "raising the bar" for its membership. There is, however, great concern that the process not discriminate against smaller, voluntary land trusts. While there is justification that the standards process "be voluntary, peer reviewed, un-bureaucratic, un-big-brother like" as one respondent stated, there is also concern that it be firm enough to establish quality expectations. While minimum standards may be appropriate, many respondents expressed concern over a certification program. Most respondents, however, indicated that there is a need for some means to ensure that certain standards or criteria have been met in accepting conservation easements, and to ensure quality control in land trust practices. There was agreement that the conservation community will benefit enormously from an appropriate level of self-regulation. Funding, technical support and the experience of other professional

associations should be solicited so that the solution is the most appropriate possible. LTA should be assisted in this type of effort by a broad spectrum of funders and partners. Conservation funders should be sought to ensure that this self-regulation solution is the best possible, since it may well be instrumental to the long-term success of voluntary land protection options.

H. Regional Stewardship Entities

The Center for Natural Lands Management has demonstrated that a separate nonprofit organization dedicated to holding and managing lands with special ecological values in perpetuity is viable. The Center is finding that it is filling a niche that is in great demand and that funding permanent stewardship is feasible. The success of the Center demonstrates that there is a need for provision of competent stewardship and management services based on scientific understanding to private, public and nonprofit landowners. The experience of the Center and its approach to costing long-term stewardship activities should be shared with a larger audience.

Since most land trusts focus on the transaction side of land saving and are reluctant to dive into full land management, there may be an opportunity to encourage the formation of other stewardship organizations like the Center or to expand the Center's geographical area. Given the differences in regional landscapes as well as the need for on-the-ground management, it is unlikely that a single national organization can fill this role, unless there is a structure of regional governance. An alternative strategy might be the development of multiple independent regional stewardship organizations modeled after the Center. The Center, TNC and other potential partners should be consulted on the potential for this strategy, its feasibility and funding opportunities.

I. Financing Stewardship

Financing stewardship activities at all levels is a challenge. The challenge increases as one advances along the continuum to community stewardship. The respondents indicated that funding for discreet stewardship activities from charitable foundations has been difficult. Raising funds for stewardship activities may be easier if such activities are framed as the logical product of land conservation and combined in a broader, continuum context. Several respondents indicated that there are government agency cost share and financing programs that are available for many land management activities, but they are often not well known to the land trust community. Publicizing these programs better could promote greater utilization. In addition, the cost ranges associated with various management activities should be identified so that potential funders would have a better idea as to both funding requirements and stewardship outcomes.

Stewardship activities offer the potential for partnering with different organizations like few other areas in land protection. Potential partners include land trusts, community groups, charitable foundations, government agencies, forestry and ranching groups, university and educational institutions, volunteers, etc. Finally, there is potential to pool resources from diverse groups, creating greater leverage and fundraising potential. Several respondents mentioned the idea of creating a pooled insurance liability fund, by state or region, to defend conservation easements. Leverage, pooling and partnership appear to be key concepts if adequate funding for a true stewardship system is to develop.

VIII. Conclusions

The findings and proposals of this report represent a snapshot of the experience and opinions of a variety of land conservation and management practitioners. In assembling this project, we attempted to represent a variety of regions, organizations and viewpoints. We hope that these investigations will be of use to practitioners in the land conservation and land management communities as well as the many partners and funders that assist them in their

important work. Stewardship is evolving rapidly. As organizations that save and manage land are becoming more knowledgeable about the complexities of land conservation, there is increased attention, concern and focus on stewardship. This maturing of the movements and organizations bodes well for advancing the art of stewardship. Conservation Partners, Inc. and the The INNW Fund welcome comments and suggestions on any of the points made in this report, as well as ideas on how we might be of use to groups and organizations that are involved in innovative projects in land stewardship. We hope this report will serve to connect the people and organizations throughout the country that are working on aspects of the stewardship issue. It is hoped that they will share and benefit from the wealth of experience and knowledge held by the many individuals and organizations that care about the health of the land that sustains our communities.

Appendix A: Participating Organizations

Applied Ecological Consulting, Inc.
Brandywine Conservancy
Center for Natural Lands Management
Iowa Natural Heritage Foundation
Alan Carpenter, Consultant
Land Trust Alliance
Liberty Prairie Institute
Little Traverse Conservancy
Lyme Timber Company
Maine Coast Heritage Trust
Natural Lands Trust
Pacific Forest Trust
Society for the Protection of New Hampshire Forests
Sonoran Institute
The Nature Conservancy
Trustees of Reservations
University of Vermont, School of Environmental Studies
Vermont Land Trust

Appendix B: Participants in April, 1999 Roundtable

Mark Ackelson	Iowa Natural Heritage Foundation
Steve Apfelbaum	Applied Ecological Consulting, Inc.
Ann Cole	Trust for Public Land
Jean Driscoll	Consultant to The INNW Fund
Jean Hocker	Land Trust Alliance
Reed Holderman	Trust for Public Land
Steve Johnson	The Nature Conservancy
Susan Lang	The INNW Fund
Robert Levenson	The INNW Fund
Audrey Rust	Peninsula Open Space Trust
Mike Sands	Prairie Crossing
Howard Smith	The INNW Fund
Cameron Barrows	Center for Natural Lands Management
Philip Wallis	Natural Lands Trust
Marty Zeller	Conservation Partners, Inc.